MYOB – Open Company File

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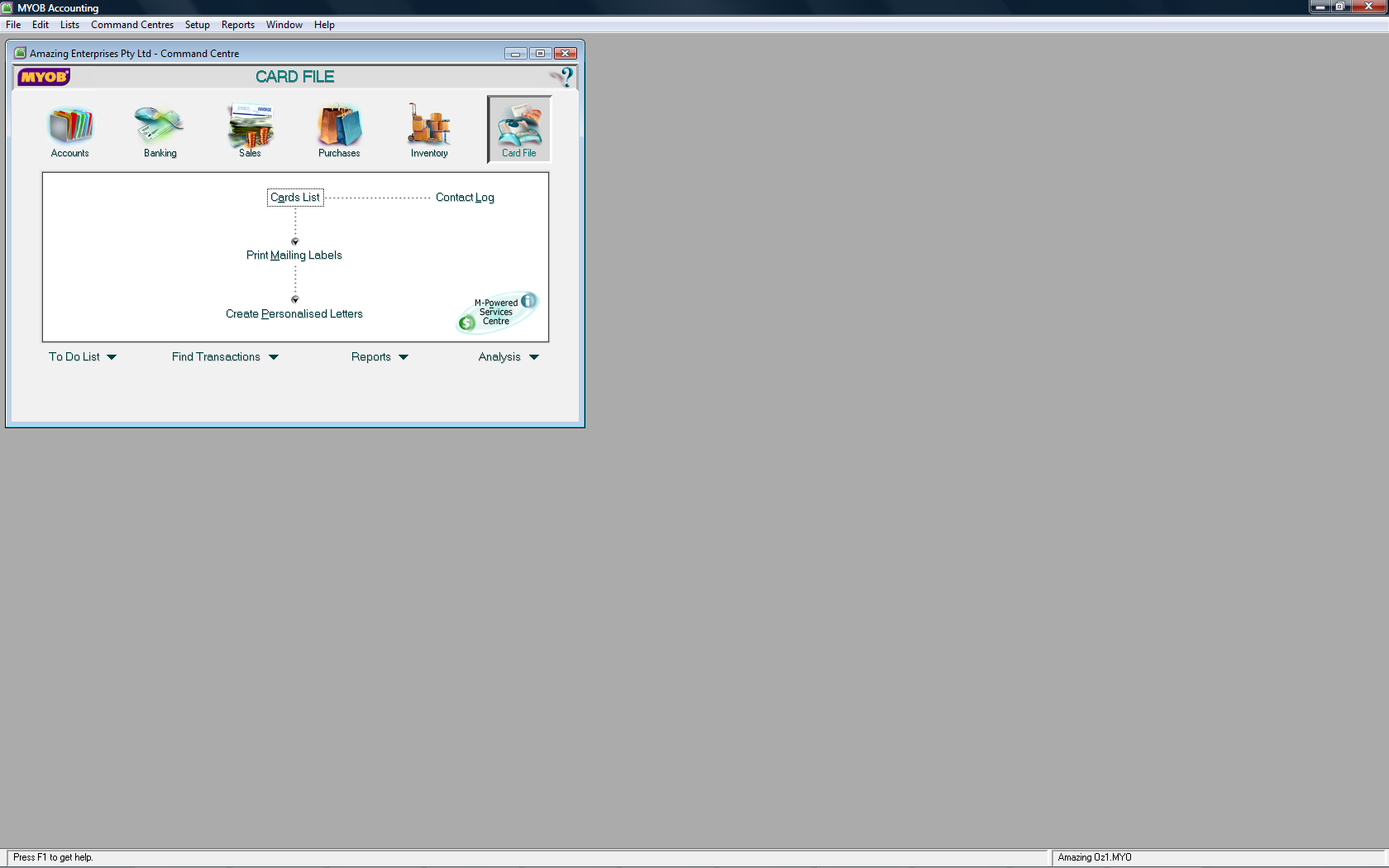
# MYOB – Add New Customer / Edit Existing Customer

Pre-requisite – Open Company File

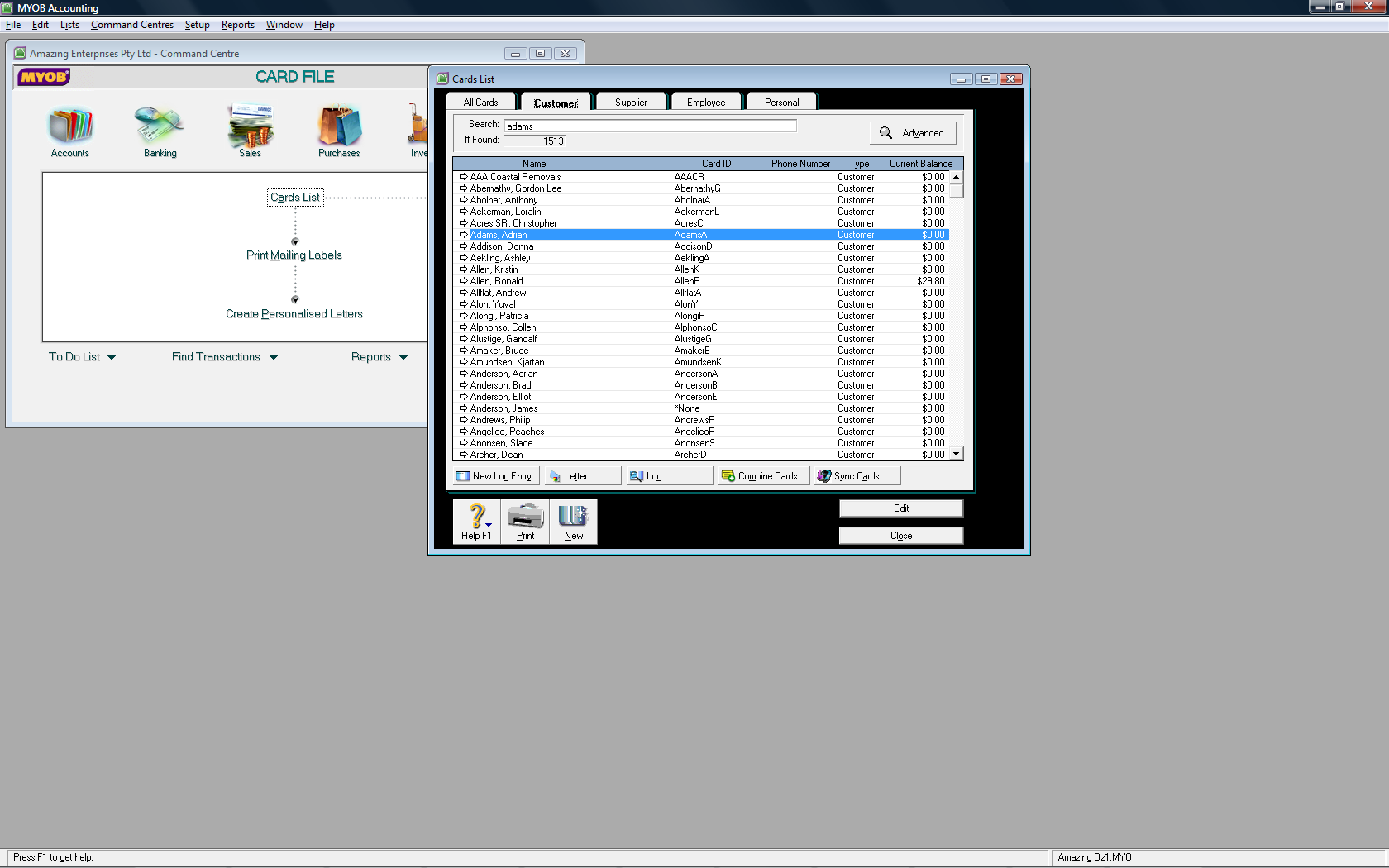
(See ‘MYOBOpenCompanyFile.doc’)

## 1) Open Company file and Select ‘Cards’ icon.

Then select ‘Card List’



## 2) Select ‘customer’ tab and type in customer name (surname first) and press the enter key to see if customer already exists



If the customer exists, the name will be highlighted.

Click Edit to view and make any required changes to existing customer.

[**See Step 3**](#Step3)

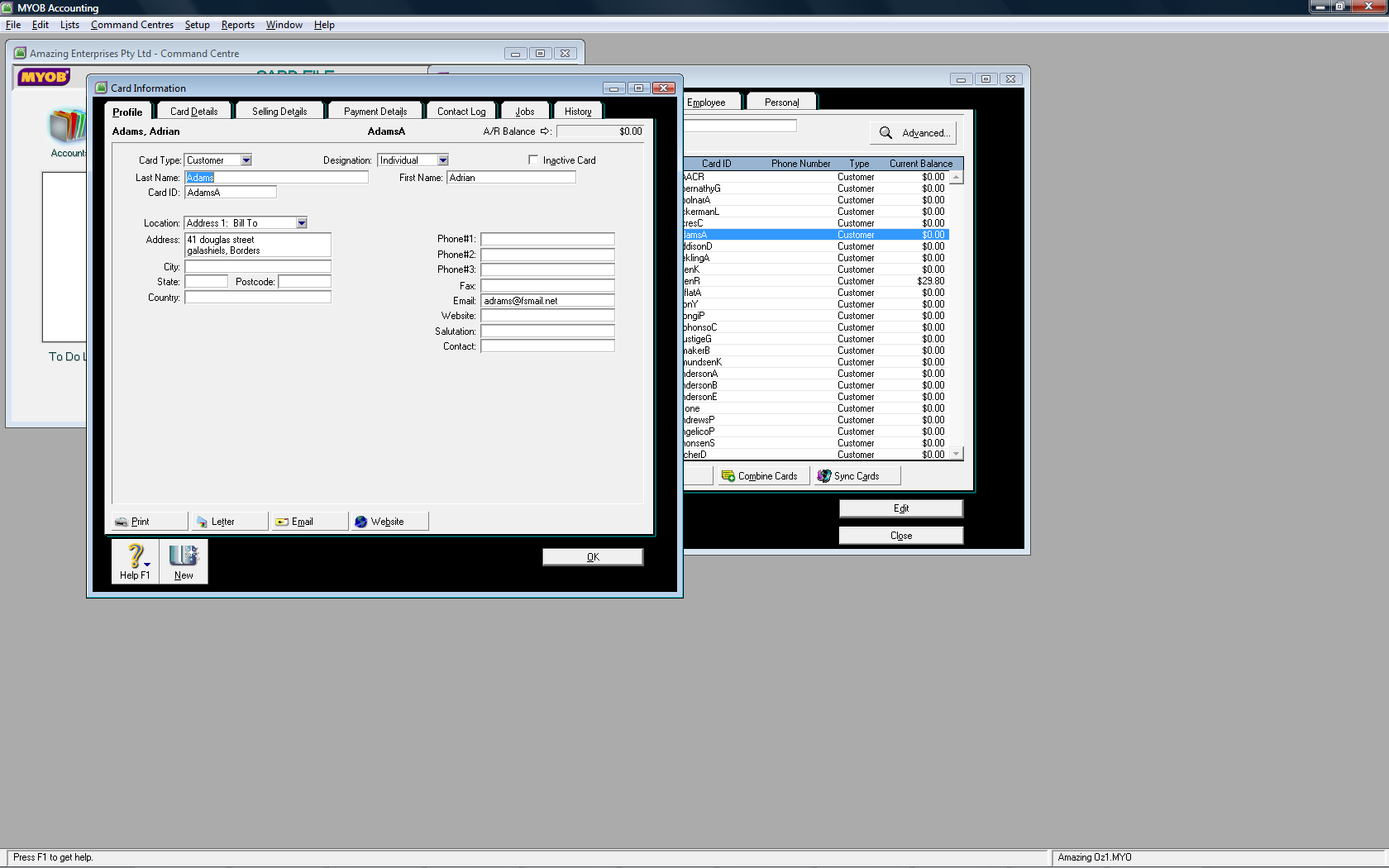
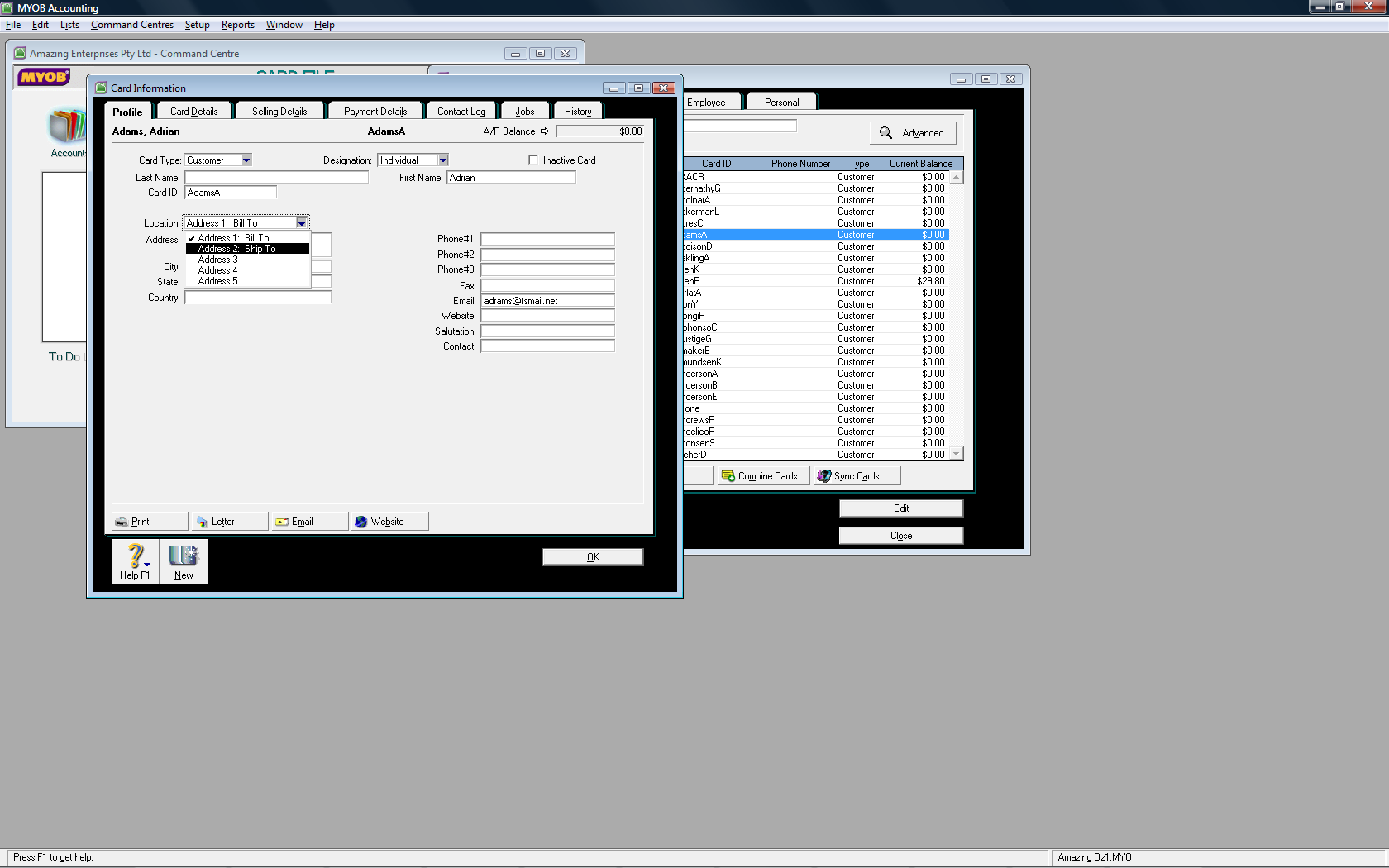
Click ‘new’ if the customer does not exist and needs to be added.

[**See step 6**](#Step6)

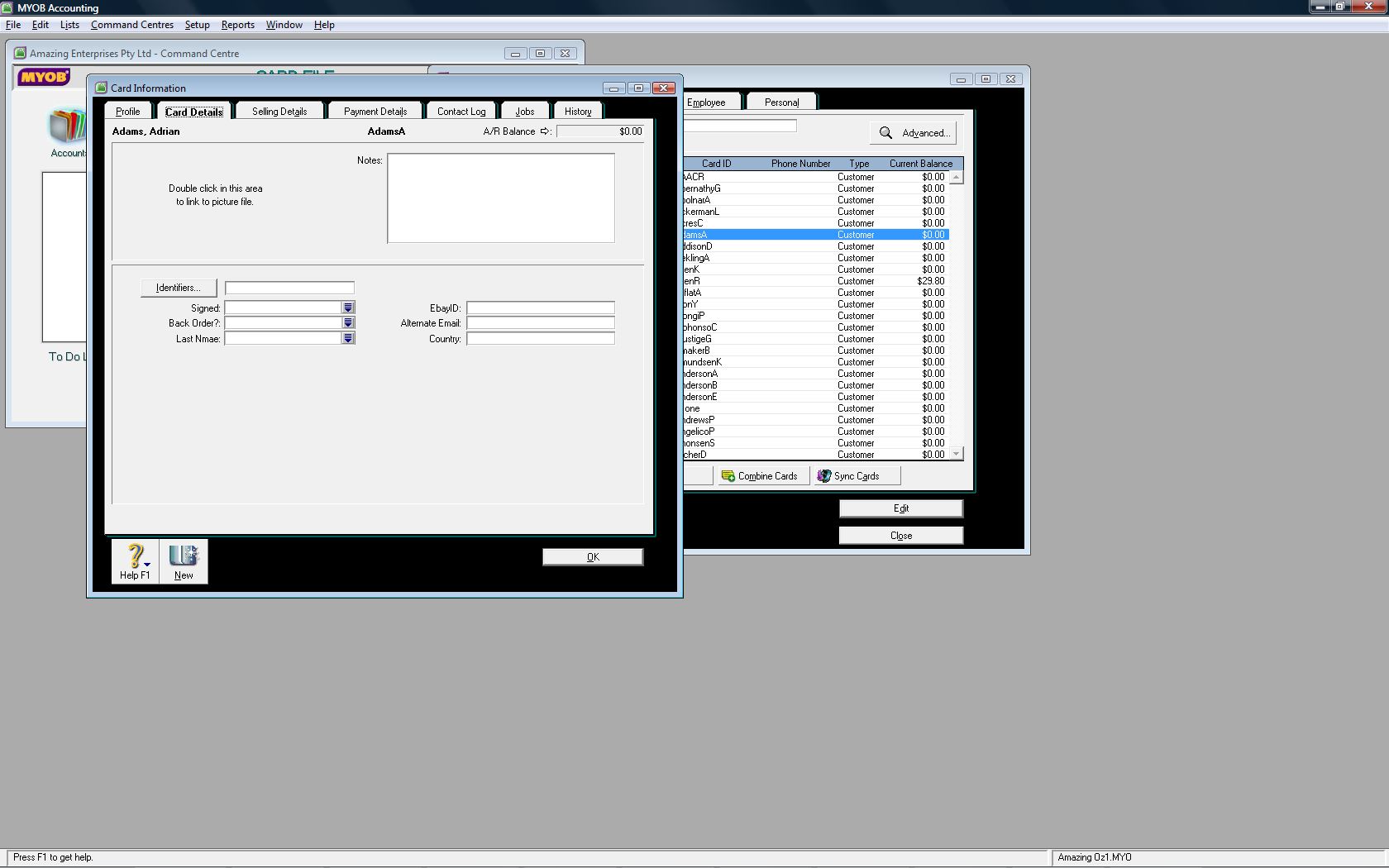
## 3) If Edit was selected, the follow window will open which displays existing entries for the customer.

Profile Tab: displays customer name, address, phone, fax, email, website etc.

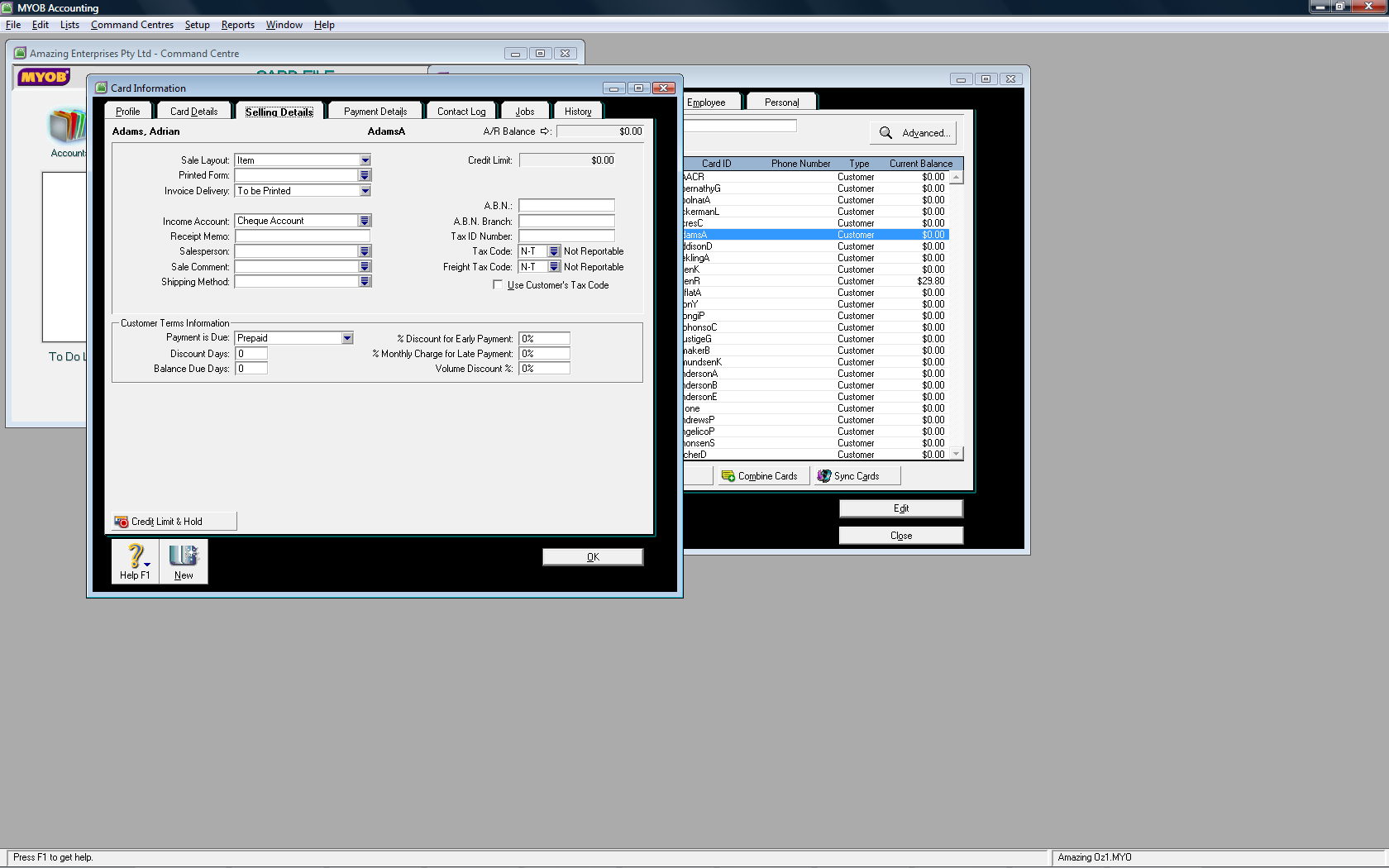
To view shipping address, click the drop down box for ‘Location’ and select Address 2: Ship To.



## 4) Click on ‘Card Details’ Tab to view/edit.

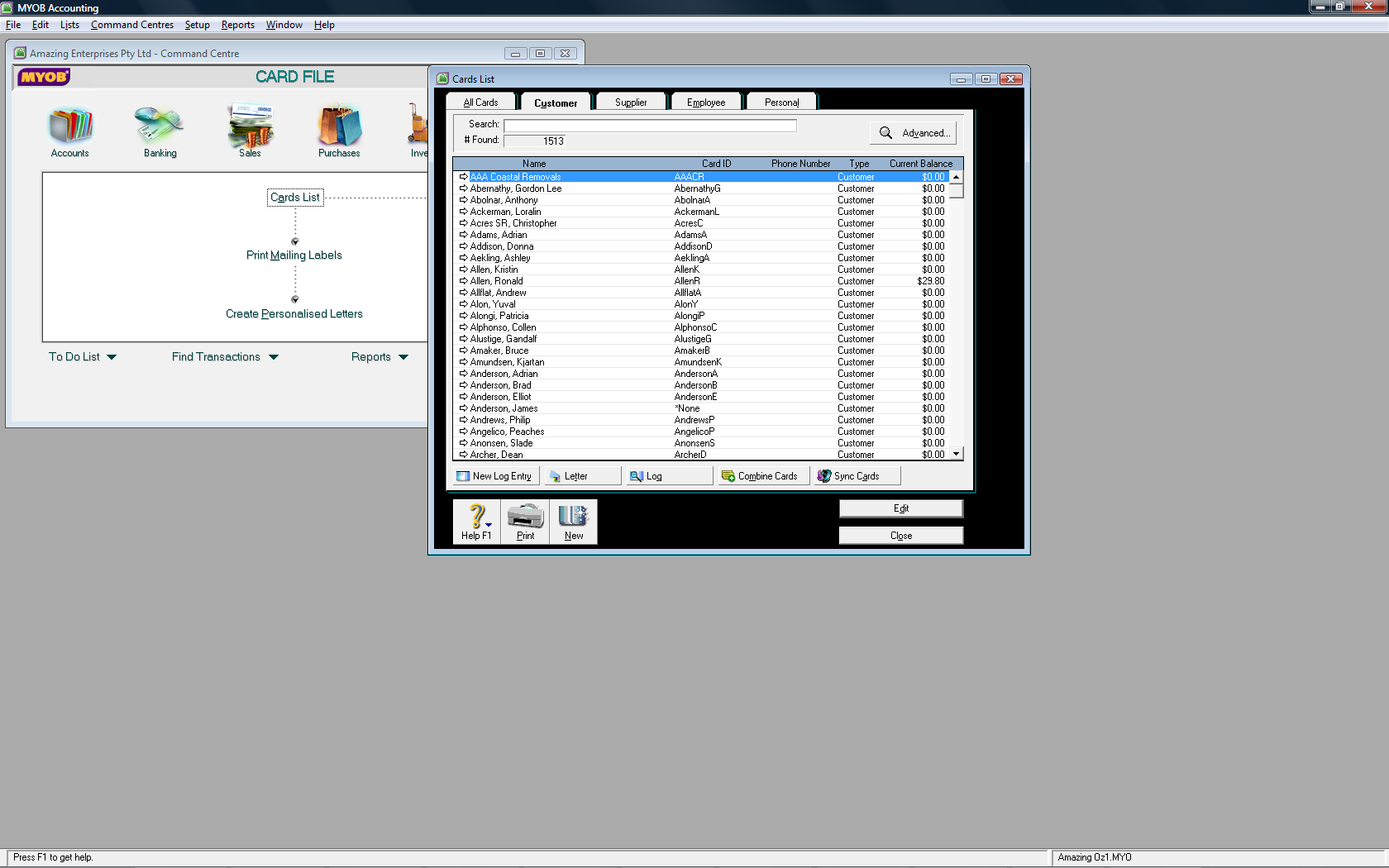


## 5) Click on ‘Selling Details’ Tab to view/edit.

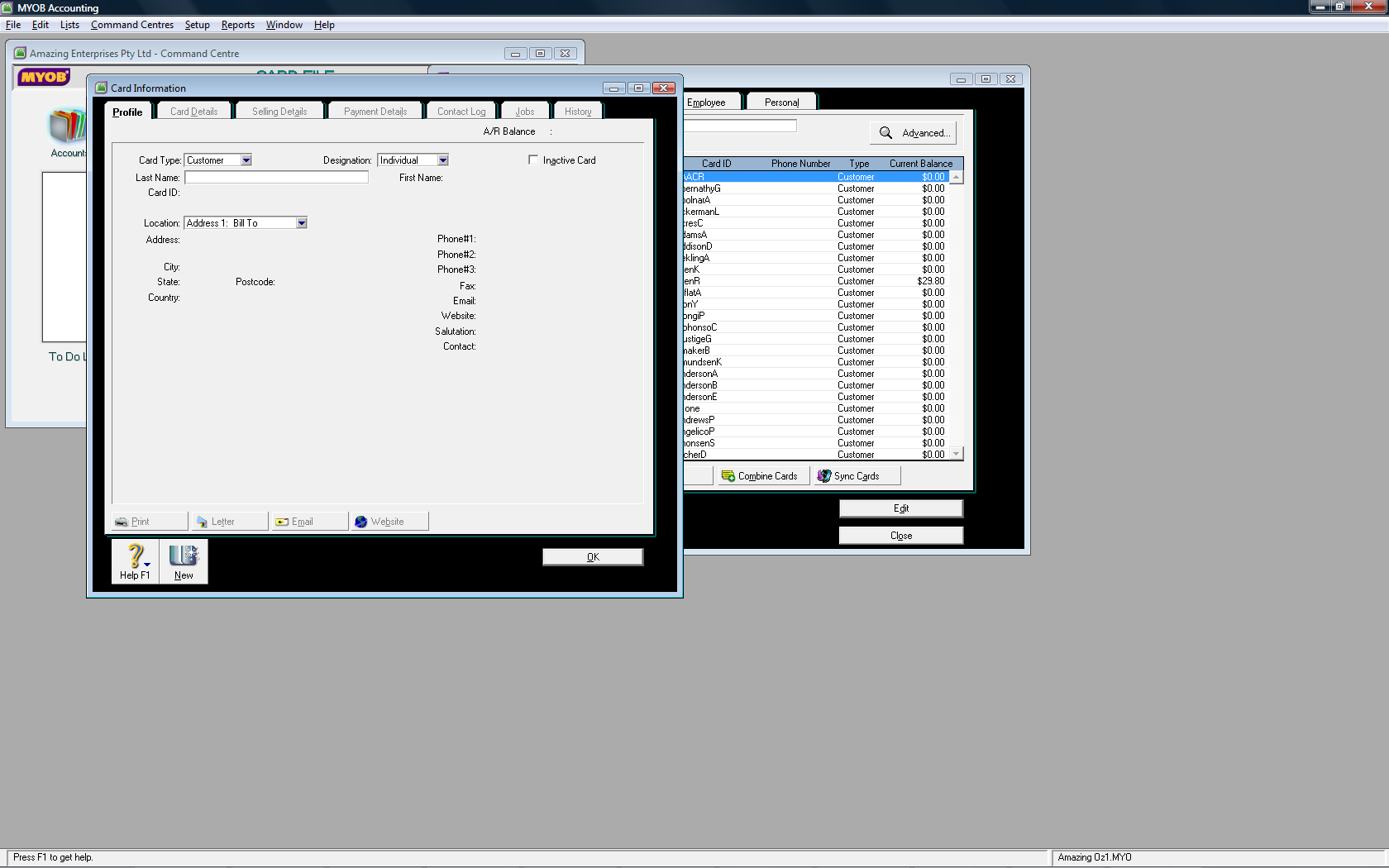


Continue with each tab as required. Click ‘OK’ when finished to save the card file.

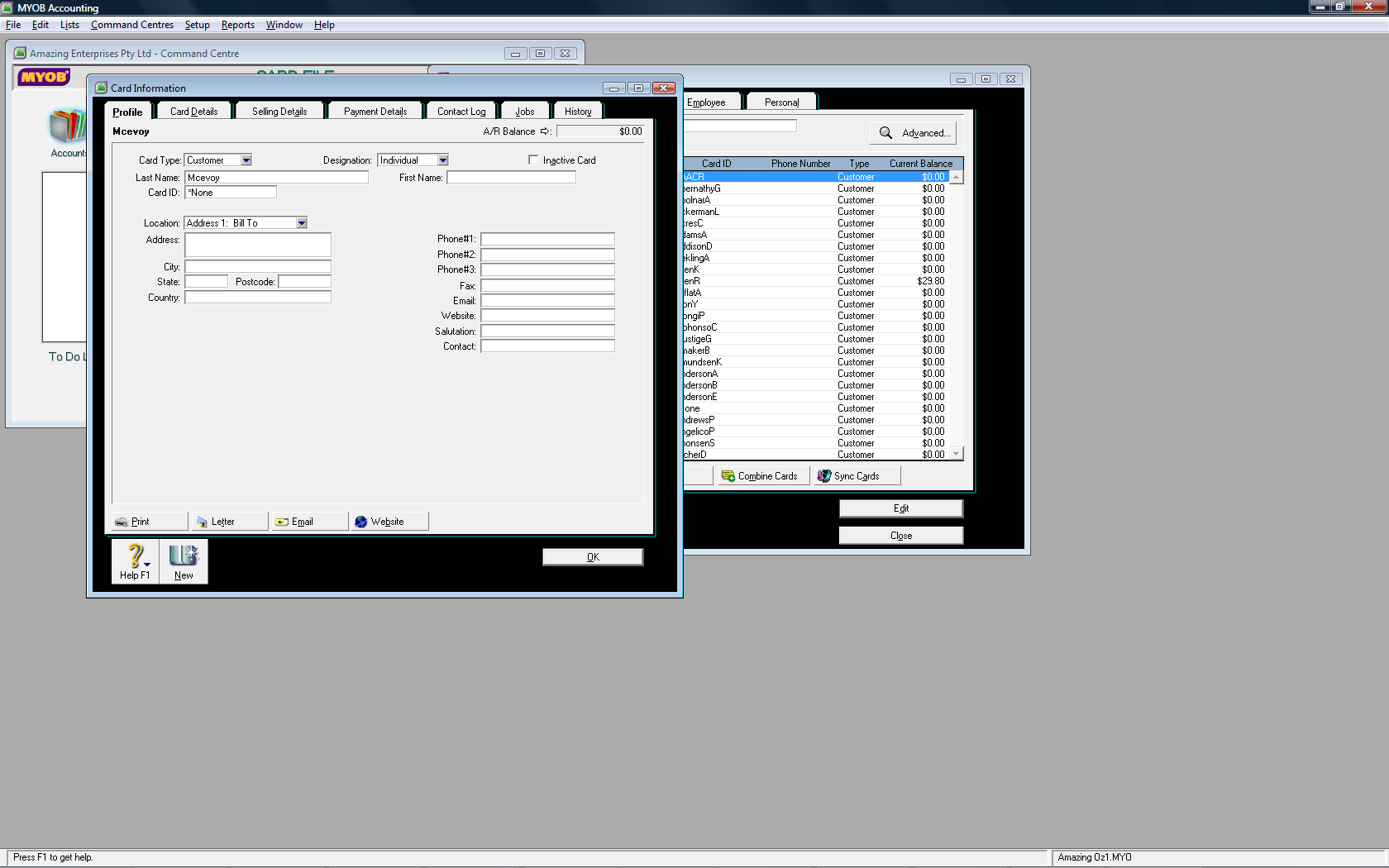
## 6) To add a new customer, click ‘New’.



## 7) The following window will pop up. Type in customer surname and press the enter key.



## 8) More options will be available for data entry.



Type in customer first name e.g. **Joanne**

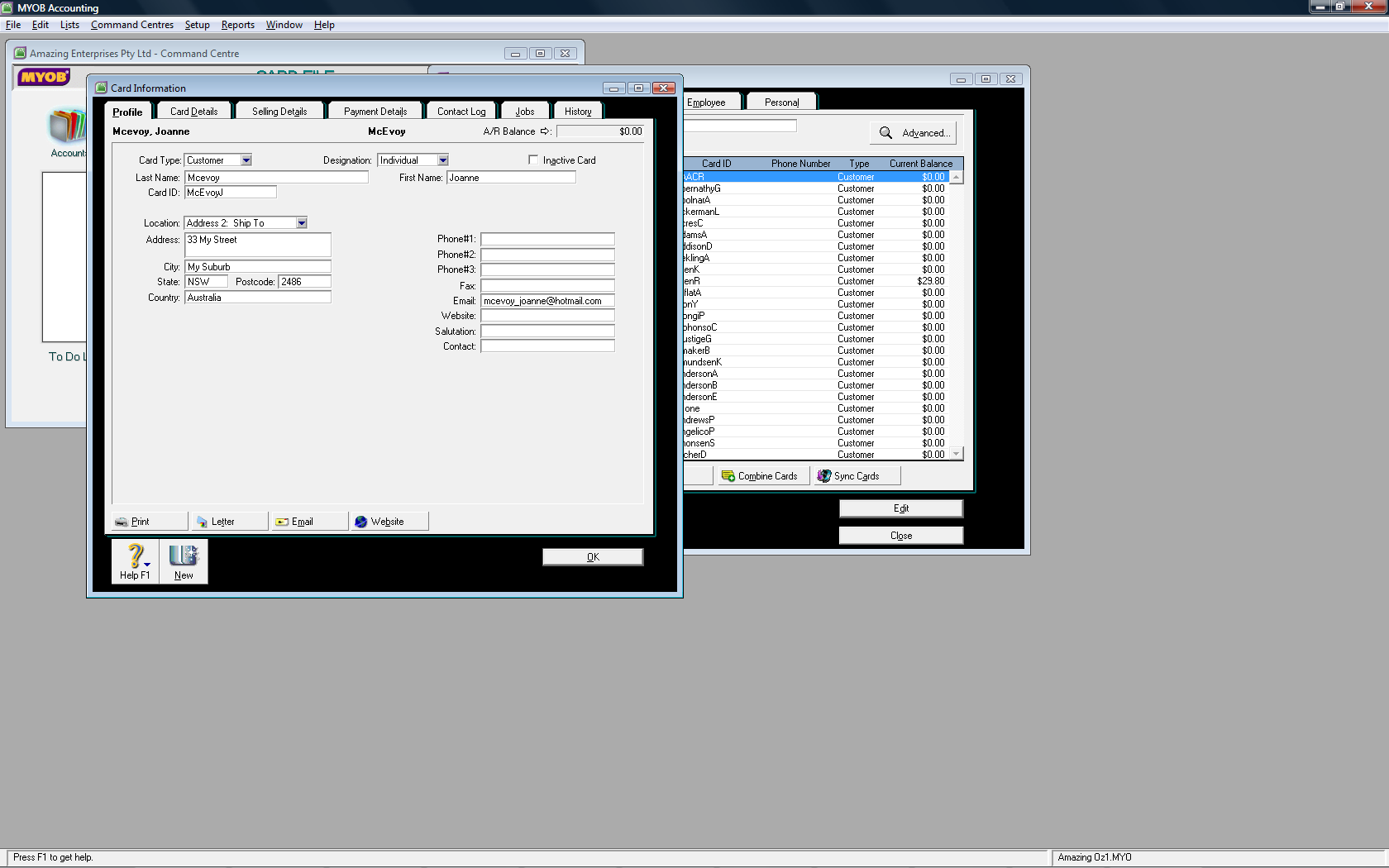
Type in Card ID e.g. **McevoyJ**

Select ‘Ship to’ in the ‘location’ [**(see step 3)**](#Step3) and enter the shipping address as required.

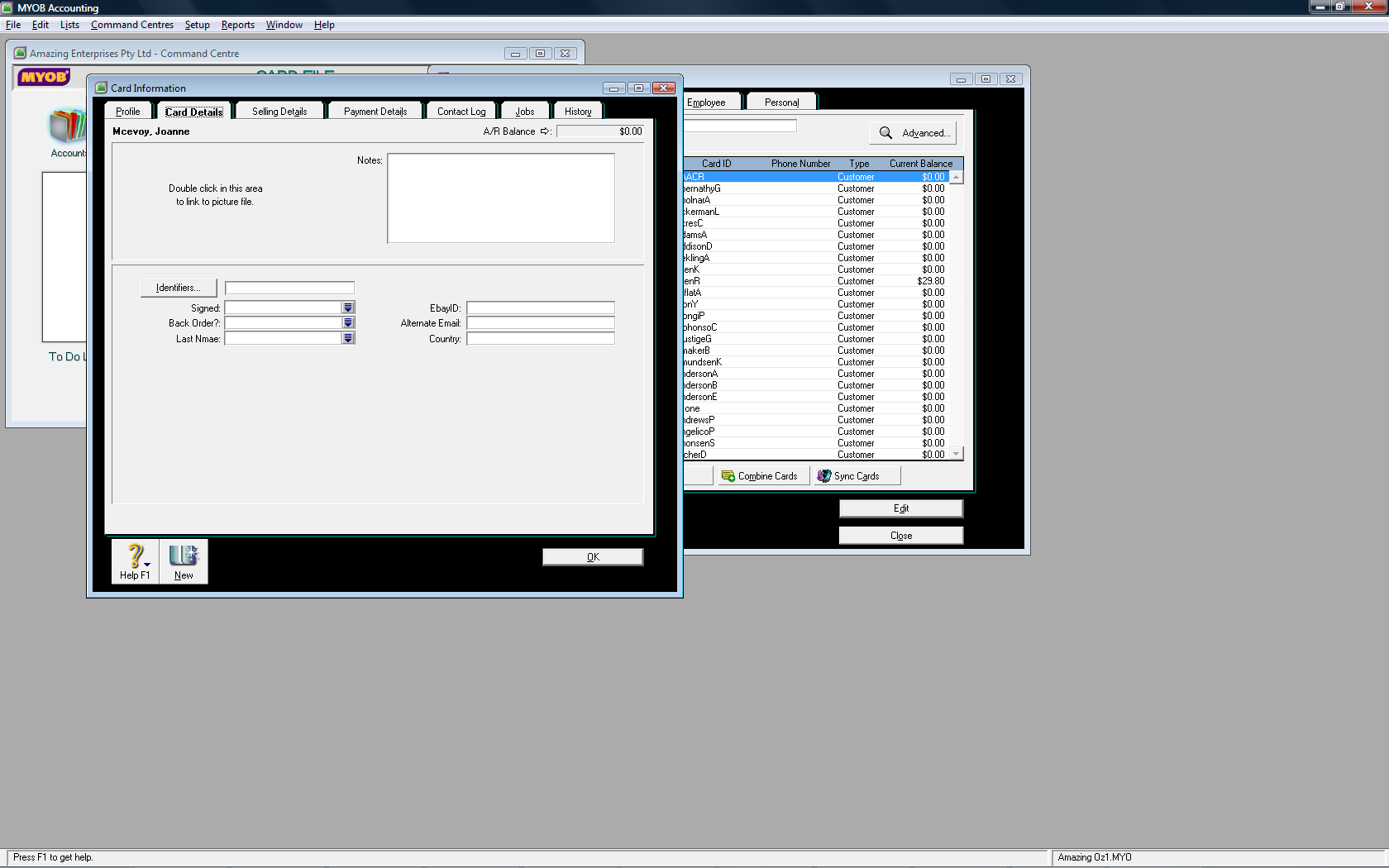
Enter email address

Enter any other relevant details available.

See below for completed entry.



## 9) Select ‘Card Details’ Tab and enter EbayID (if known).



## 10) Select ‘Selling Details’ tab.

**SET**

\* Sale Layout to ‘**Item’**

\* Invoice Delivery to ‘**Already Printed or Sent’**

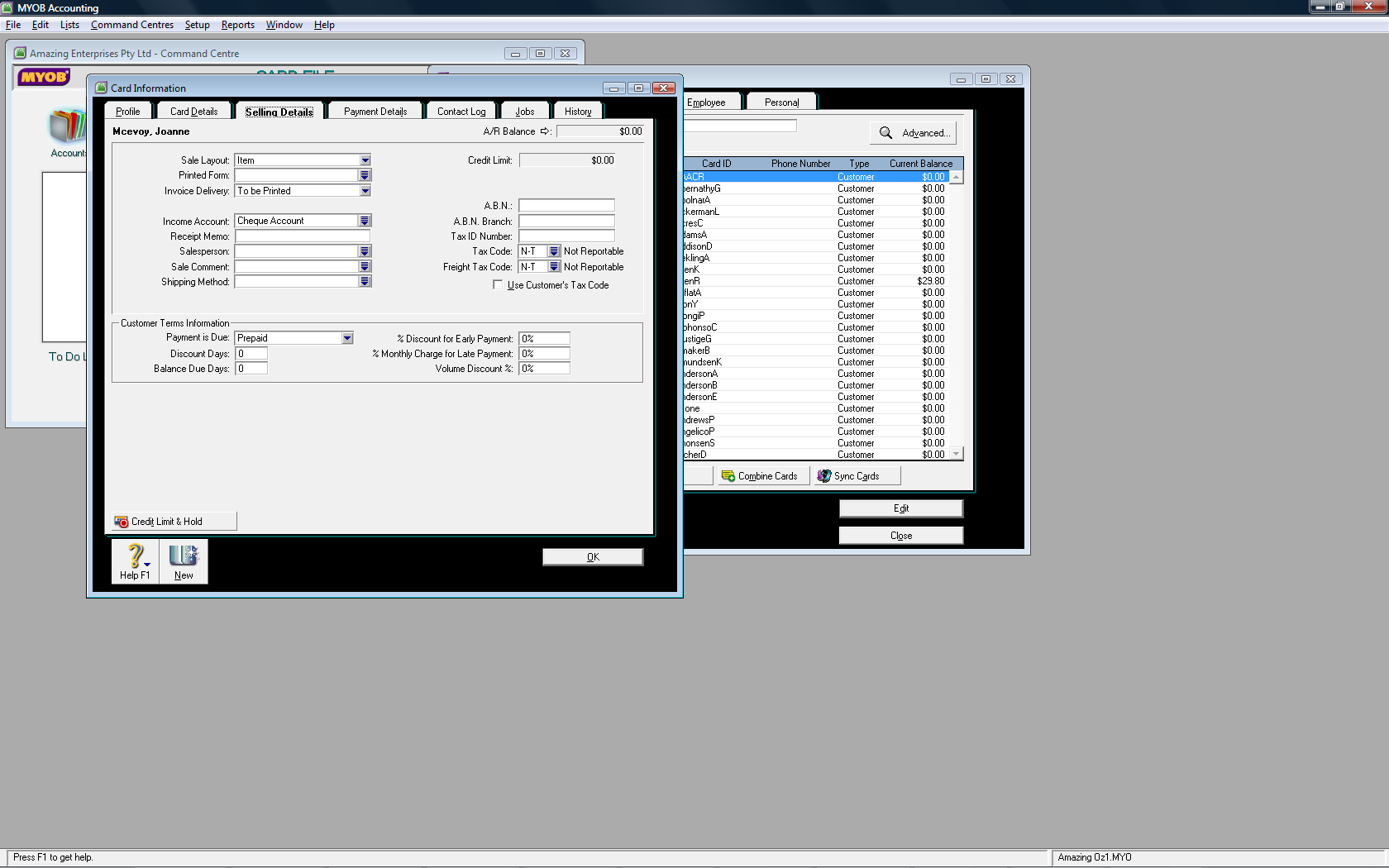
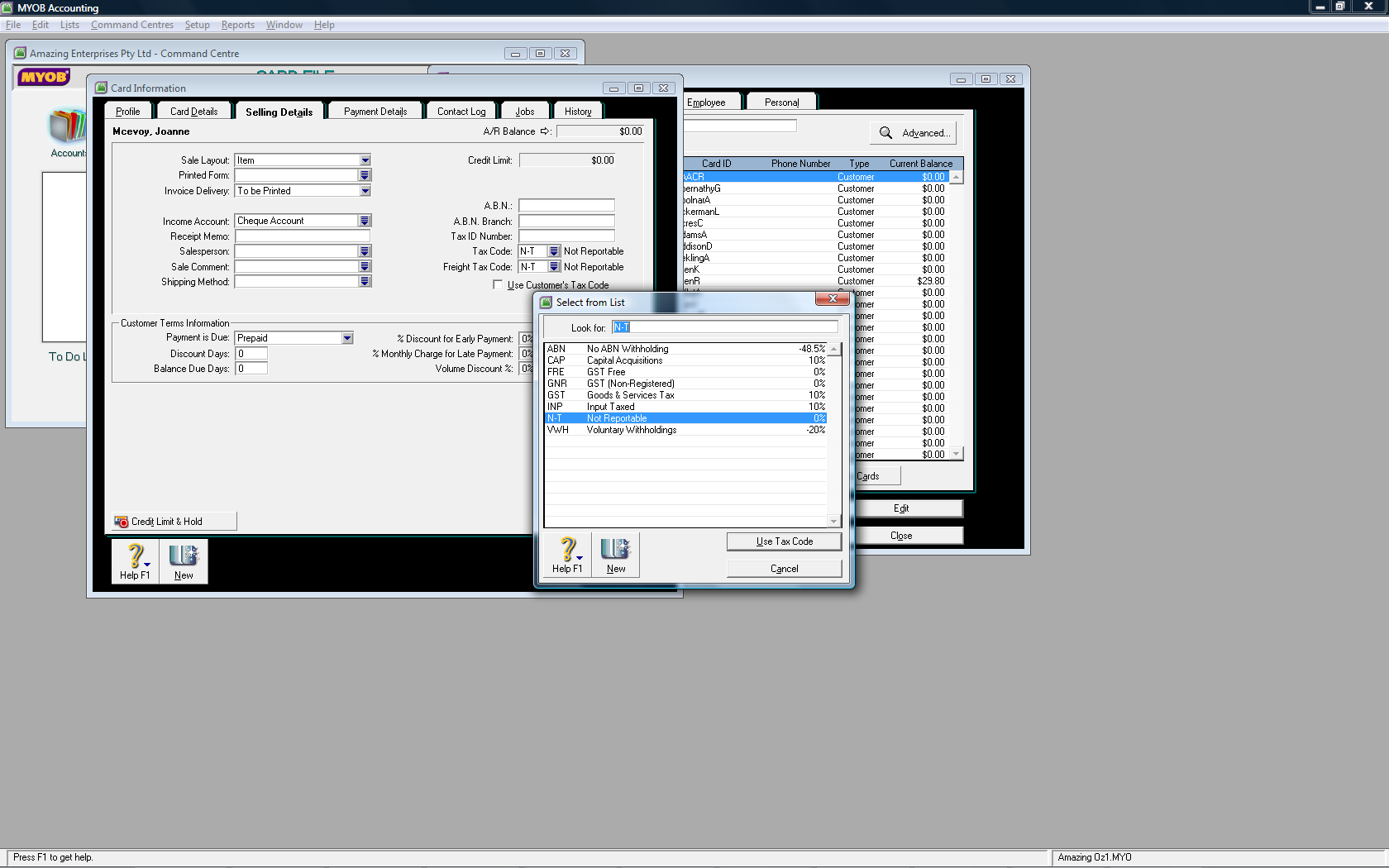
If Australian Customer:

Change Tax Code to GST.

If Overseas Customer:

Change Tax Code to N-T or FRE?

\* Click the arrow and make TAX selection from the window that pops up. Click ‘Use Tax Code’.



MCSO01596_0000[1]Click ‘OK’ to save changes.

### Congratulations

You have successfully added a new Customer.